



The State Bar *of California*

OPEN SESSION

AGENDA ITEM

IV.A. DECEMBER 2020

DATE: December 7, 2020

TO: Members, California Board of Legal Specialization

FROM: Amy C. Nuñez, Director, Office of Admissions

SUBJECT: Report on Financial and Operational Key Indicators

SUMMARY

A report on financial and operational key indicators is attached for consideration during the December 2020 California Board of Legal Specialization (CBLS) meeting.

BACKGROUND

The CBLS is provided with key operational indicators at each meeting to assist with program oversight.

DISCUSSION

Year-to-Date Financial Report

The Board of Trustees Financial Report for the third quarter (Q3) through September 30, 2020 indicates that expenditures are in line with projections (Attachment A). The Legal Specialization budget through Q3 2020 demonstrates a 0.1 percent revenue decrease when compared to all of 2019. However, based on actual 2020 expenses, there is an overall \$1,385,985 positive change in current net position.

Total Number of Certified Specialists

As of December 1, 2020, there are 5,024 current certified specialists, a decrease of 43 certified specialists versus the same time last year (Attachment B). Only Appellate Law, Criminal Law,

and Estate Planning, Trust & Probate Law saw increases in the number of specialists with 15 new specialists between the three overall. The largest decrease in specialists came from Family Law and Workers' Compensation Law with a double-digit increase in each area, losses of 10 and 22 respectively.

Total Number of Resignations by Reason

There have been 136 resignations of certificates of specialization through December 1, 2020 versus 160 in all of last year, and 158 in 2018 (Attachment C). Based on the current resignation pattern, staff expects additional resignations through the end of the year, but that the total number of resignations for 2020 to be comparable to the previous two years.

Legal Specialist Continuing Legal Education (LSCLE) Compliance Reporting

When 2020 Compliance Group 3 reporting opened, there were a total 1,949 specialists (including dual specialists) with outstanding LSCLE compliance (Attachment D). The reporting period for Compliance Group 3 ended on February 1, 2020, however, at its February meeting the CBLS approved an allowance for the LSCLE deadline to be extended to match any corresponding MCLE reporting deadline, which is currently September 30, 2020. As of December 1, 2020, 103 (5.3 percent) of those specialists remain outstanding on their LSCLE compliance. Compliance statistics by specialty area are noted in the attachment.

Staff provides a recommendation of annual revocations for failure to comply with the LSCLE requirement, to be discussed for approval as a part of Open Session Item IV.E.

2021 Compliance Group 2 reporting just opened on December 1, 2020, and there were a total of 1,397 specialists (including dual specialists) who will be due to report LSCLE compliance by February 1, 2021 (Attachment E).

ATTACHMENT(S) LIST

- A. Board of Trustees Financial Report: Quarter Three through September 30, 2020
- B. Total Number of Certified Specialists as of December 1, 2020
- C. Total Number of Resignations by Reason, 2018 and 2019 Annual v 2020 Year to Date
- D. Total Number of Certified Specialists in Compliance Group 3
- E. Total Number of Certified Specialists in Compliance Group 2